Case study : Sygma Bank

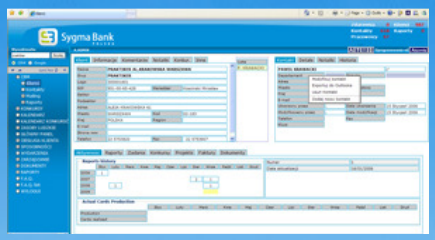
Sygma Bank Polska is a subsidiary of Sygma Bank SA Group LASER COFINOGA. The Company is specialized in the financial support and marketing of the distribution channels and retailers themselves by offering payment services, credit cards and loyalty programs. With 1,000 employees in Poland, the group operates over 10,000 stores.

■ Installed modules

- Companies & Contacts Management
- Progress Reports & Monitoring Trading
- Business Challenges Management
- FAQ Management (Frequently Asked Questions)
- Extranet for Stores
- Business Plan Management
- Work Schedule and synchronization with Outlook
- Event Management
- Qualification Campaigns & Inquiries
- Employee Management
- Document Management
- Analysis & Management Reports

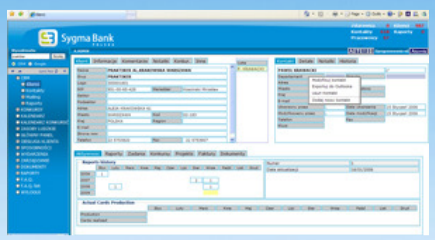
■ Companies & Contacts Management

All the employees can access to the list and details of all the groups, of all 1,000 stores, their contacts and all their history. All activity reports, projects, tasks, invoices, documents are available according to the user's rights and authorizations. The module also includes lists of customers and contacts. The mailing and e-mailing, contact activity analysis and commercial activity analysis can be done within this module.



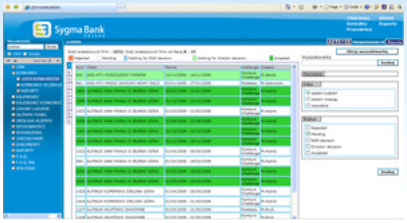
■ Progress Reports & Monitoring Trading

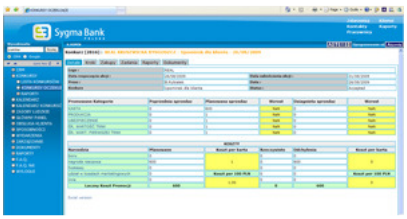
The sales managers connected from their store or when they are in mission with their laptops indicate online all their trade approaches with the managers of the shops, prospects and customers (Meetings, meals, telephone calls, presentations, negotiations, etc.)



■ Business Challenges Managing

The business challenges are created and managed from the Portal. With the help of various means (Hostess, gifts, buying vouchers, etc.), the challenges are dedicated to increase the number of sold loyalty cards and the amount of the purchases of final customers. The module therefore allows the managers to determine the sales targets per shop, per area or per distribution chain, to validate the challenge by the commercial management of SygmaBank and to monitor daily the sales. The challenge schedules and full reports per shop are at your disposal.



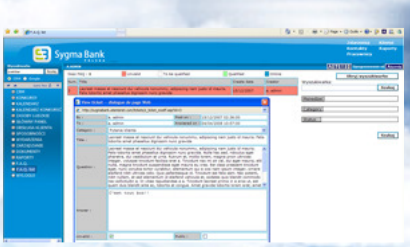


Management Portal

Management Portal

■ FAQ Management (Frequently Asked Questions)

Shop assistants can ask questions online about the problems and conditions of opening the payment or loyalty card. The question then follows a management process (workflow). According to its type, it is sent to the concerned manager, then to the sales management or group marketing and returned to the shop. A search engine allows to select similar questions and then display the already provided answers.

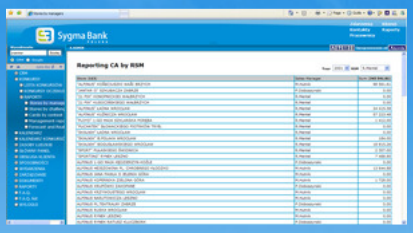


■ Extranet for Stores

The shop managers can access to the required modules (CRM, Challenge, Document Management and FAQ) to perform all their actions and follow their business directly from their store.

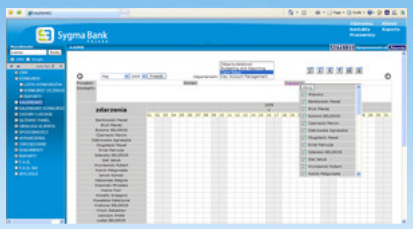
■ Business Plan Management

After synchronization of production data (number of cards, sales per date, per store per shop assistant) from the central base of Sygma Bank, module allows, with specific assumptions, to achieve all annual business plans of the group. This module can also provide monthly reports, to monitor and understand the differences between the real and budgeted data.



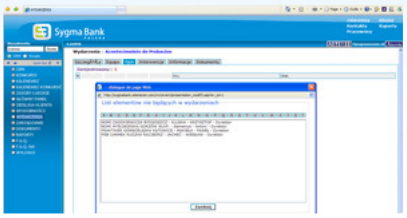
■ Work Schedule and Synchronization with Outlook

The central work schedule of the application allows to record all appointments, business and technical tasks for the future but also to indicate the activity reports. Several views per day, week or per month allow to have a clear and consolidated overlook of team planning per department. Synchronization with Outlook allows you to copy the tasks, the emails and the contacts in one direction and another.



■ Event Management

The module gives the possibility to manage all marketing events, seminars, presentations, product launch dedicated to prospects and B2B or B2C customers. The task planning, the intervention schedule, the list of the invited guest, of those who confirmed their participation and those who arrived, documents and photos share are available within the module.



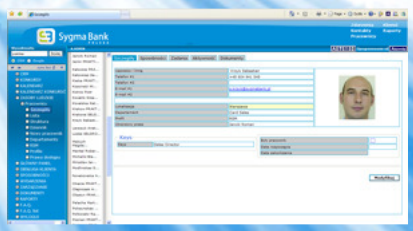
Management Portal

■ Qualification Campaigns & Inquiries

The module offers the possibility to create quiz and inquiries with all types of questions (closed and open) and to manage them online, by phone or from the web site by targeted contacts. Full statistics allow you to follow the campaigns conduct and to identify the adequate marketing analysis.

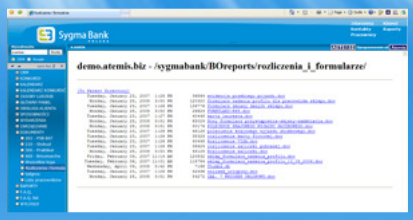
■ Employee Management

The application offers a 360° view of employees. All the employees' details and skills are displayed in a dynamic and flective way. Managers analyze the progress of operations, activity distribution by project and the tasks to achieve. The available tabs include information, skills, teams, activities, projects, monthly reports, documents, rights and access authorization.



■ Document Management

Commercial documents are stored digitally and are available to business managers from the Intranet or Extranet of Sygma Bank (Advertising, Logos, Reports & Analysis, etc.)



■ Analysis & Management Reports

Reports and complete analysis of all the modules and all data are at the disposal of the department managers and chief directors of the company in order to manage their business and their teams in a better way. Business, marketing and financial activity analysis, quantity of cards, the turnover per year, per group, per store, per sales manager, and per service are also offered within this module.